



ARGENT STREET

# Financial Adviser Profile

## Overview

Financial advice shouldn't feel outdated or overwhelming. Through a genuine partnership, I want to help you take control of your future without forgetting to enjoy yourself along the way. My focus is on clear, practical advice, drawing on my investment experience to deliver strategies that are tailored, transparent and aligned with your goals at every stage of life.

I've been with the Argent Street team for more than 7 years, prior to that I held senior roles in the funds management industry for over 20 years.

Beth Anthony is a Sub-Authorised Representative of Argent Street Pty Ltd, Corporate Authorised Representative No. 453150. Authorised Representative No. 1319946.

## Qualifications

Beth Anthony holds a Graduate Diploma of Financial Planning and meets the competency requirements under ASICs Regulatory Guide RG 146.

## Professional Memberships

Beth Anthony is a member of Financial Advice Association Australia (FAAA) and abides by their code of professional conduct and ethics.

## Authorisations

Beth Anthony is authorised as a Provisional Adviser and is able to provide advice and deal (under the supervision of a senior Capstone Financial Adviser) in the following financial products:

- Life Products including Investment Life Insurance Products and Life Risk Insurance Products
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Deposit and Payment Products
- Retirement Savings Accounts ("RSA") products
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government
- Superannuation
- Securities.

### Restrictions – Securities Only

This authorised representative is only authorised to give class of product advice in relation to Securities.



### Beth Anthony

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Beth Anthony is currently undertaking a Professional Year of work and training in accordance with subsection 921B(4) of the Corporations Act 2001. Their Supervisor during this period is Jeff Yacoub, Authorised Representative No. 312920 of Argent Street Pty Ltd.

Jeff Yacoub will be responsible for any advice provided by Beth Anthony during that time.

Beth Anthony is authorised to provide financial advice, conduct client meetings and prepare advice documents only under the supervision of a senior Capstone Financial Adviser.

## Argent Street Advice Fees and Charges

Beth Anthony will be paid Advice Fees and Commissions as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you before it is charged.

Beth's fee for the preparation of a Statement of Advice (SoA) and other Advice documents will vary depending on the complexity involved and the time taken. The SoA fee is typically between \$3,500 and \$9,000 incl. GST.

Beth provides the option of ongoing reporting and advisory services. This is generally a fixed fee, typically between \$4,000 and \$12,000 incl. GST.

Argent Street Pty Ltd pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Beth Anthony is a salaried employee of Argent Street Pty Ltd and will receive a salary/benefit from this company.

## Other Benefits Beth May Receive

From time to time Beth Anthony may be invited to social or sporting events and receive the occasional gift such as a bottle of wine or hamper on special occasions. These non-cash benefits will have a value of less than \$300. A register listing the details of any non-cash benefits between \$100 and \$300 is maintained. These invitations and gifts do not influence the advice provided to you. If you would like more information you can request a copy of the register.

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This Adviser Profile has been authorised for distribution by Capstone Financial Planning Pty Ltd. AFSL No. 223135. This Adviser Profile forms part of the Financial Services Guide (FSG) and is to be read in conjunction with the FSG.